United Nations
Economic Commission for Europe

Food and Agriculture Organization
of the United Nations

ECE/TIM/INF/8

**TIMBER AND FOREST INFORMATION SERIES**

# TIMBER COMMITTEE YEARBOOK

# 2001

**UNITED NATIONS**

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United Nations Economic Commission for Europe
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of the United Nations

Timber Section
Geneva, Switzerland

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**UNITED NATIONS**
**New York and Geneva, 2001**

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## ABSTRACT

*The UNECE Timber Committee Yearbook 2001* contains an overview of the Committee's activities and bibliographical references for its publications. The Committee's activities include broadly: contributing to follow-up to UNCED and the pan European Ministerial Conference for the Protection of Forests; its annual session as well as those of its subsidiary bodies and teams of specialists; collection and analysis of statistics on forest products, forest products markets and forest resources; promotion of sustainable forestry; and assistance to countries in transition in central and eastern Europe.

# THE UNECE TIMBER COMMITTEE YEARBOOK 2001

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# PREFACE

The *Yearbook* is intended to disseminate the information on the Timber Committee's activities among those for whom it would be most useful - experts in the fields under consideration. The aim is twofold: to provide an overview of the Committee's activities; and to provide bibliographical references, so that interested experts may obtain the necessary documents as quickly and easily as possible. The *Yearbook* cannot be an exhaustive account of all the Committee's activities, which are set out in the Committee's formal report and associated documents.

The development of the Timber Committee website (see address below) constitutes a complement to the *Yearbook* as it contains more detailed information on the numerous activities and is updated constantly.

Information about the publications or any other aspect of the Committee's work may be obtained by writing to the secretariat:

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# I. THE TIMBER COMMITTEE'S ACTIVITIES IN 2000

## 1. Forest Resource Assessment 2000 - Temperate and Boreal Zones

The year 2000 saw the completion and publication of the major Timber Committee study on the Temperate and Boreal Forest Resources Assessment (TBFRA-2000). The Main TBFRA-2000 Report "Forest Resources of Europe, CIS, North America, Australia, Japan and New Zealand" (industrialised temperate/boreal countries), which is an important contribution to the Global Forest Resources Assessment process, was published in June 2000. The report presents the most recent and the best possible information on the forest resources of the fifty-five countries, covering practically all aspects and functions of the forest. The TBFRA study is a comprehensive and reliable information pool for the continuing global forest dialogue and, first of all, for the discussion within the pan-European Process on Protection of Forests.

The publication of the report was accompanying by the intensive dissemination and public relations work. The study was posted in full at the Committee web site:
http://www.unece.org/trade/timber/fra/contents/htm and distributed widely in paper format, a number of press releases were issued. Substantial articles and detailed information about the TBFRA results were presented in such prominent mass-media tools as "Financial Times", "Holz-Zentrallblatt", other professional periodicals and electronic journals. The TBFRA findings were presented and well received at the XXI IUFRO World Forestry Congress (Kuala-Lumpur, August 2000). The results of the study were used at the FCCC Conference of Parties (COP-6) in the discussions on the Kyoto protocol (The Hague, November 2000). The public relations work is being done further to make the TBFRA data available to as many users as possible.

In October 2000 the joint session of the UN/ECE Timber Committee and the FAO European Forestry Commission endorsed the TBFRA-2000 implementation and results, "which provide a significant improvement of knowledge of the world forest resources". The joint session expressed its high appreciation of the work done by the national correspondents, team of specialists on TBFRA-2000, consultants, the secretariat and all those involved in the project, including the preparation of the main report and the elaboration of the TBFRA electronic database.

The follow-up work has started after the publication of the main TBFRA-2000 report. The electronic database has been finalised and published on CD-Rom, a number of accompanying papers (up-date on Russia, biodiversity analysis) are being prepared. The TBFRA success has made it possible to identify areas which need further exploration in the interest of improving knowledge of world's forests, e.g. on "protected forest areas" on which further understanding is currently needed. The work with countries in such areas will be continued in the future.

The next meeting of the team of specialists on TBFRA, which is scheduled on June 2001 in Victoria (Canada), will review the follow-up work of the Assessment, its forest policy implication, and discuss the preparation aspects for the next round of the temperate/boreal forest resources assessment.

## 2. Promotion of sustainable forest management in the region

Support for sustainable forest management in the region and for the global and regional "processes" in this area have been at the heart of ECE/FAO activities since the mid 1990s. The regular core activities of ECE/FAO in the field of monitoring and analysis, notably TBFRA, statistics on production and trade and forest sector outlook studies represent the major contribution in this field, as they contribute to the essential infrastructure of data and understanding which are necessary for realistic and well informed dialogue and decision making on forest sector policy.

However there are also more direct inputs and contributions between ECE/FAO and the international forest dialogue at the regional and global level. Cooperation with the Ministerial Conference on the Protection of Forests in Europe, the main regional policy forum, has become even closer than before: ECE/FAO supplies data on quantitative indicators of sustainable forest management, and monitors forestry assistance to countries in transition. Teams under the Joint FAO/ECE/ILO Committee have prepared issues papers for MCPFE on socio-economic aspects of the sector and on participation in forestry decision-making. MCPFE, ECE/FAO and other partners are carrying out a special enquiry on forest-protected areas jointly. The programme of work of the MCPFE draws heavily on the activities of partner organisations, in order to find synergies and carry out necessary activities in the most appropriate forum: about a third of the activities in the MCPFE programme are being carried out by ECE/FAO, notably the Joint Committee.

The global level dialogue, notably the Intergovernmental Panel on Forests (IPF), identified a number of areas for future international work: ECE/FAO has considered where it can make a contribution, and identified "trade and environment issues in the sector" and "promoting the sustainable use of wood" as areas where it could make a contribution at the regional level. The UN Forum on Forests (UNFF) set up in 2000, will consider whether there should be a regional dimension to the global dialogue: if this idea is approved, no doubt, ECE/FAO would play a role.

### 3. European Forest Sector Outlook Studies

The European Forest Sector Outlook Study Project has been very active this year. Its activities are based on the recommendations and suggestions of the core group meeting, which was held in March 2000. The meeting proposed to change the title of the outlook activities to "European Forest Sector Outlook Studies" (EFSOS), reflecting the increasing importance of non-market benefits from forestry.

The core group defined the objectives of further EFSOS activities as an analysis of the development of the forest and forest products sector. The future work will be started with the elaboration of a baseline study (European Timber Trends and Prospects), based on the objectives and approach of the last outlook study (ETTS V), improving on the latter depending on the available resources. The baseline study will describe the development of the forest sector in a "business as usual" scenario. This baseline study will be complemented by specific studies, analysing the impact of changes in policy, market innovations and exogenous factors (e.g. climate change).

The core group agreed on ex-post analysis of the forest sector in order to describe the influence of driving forces in the past. Considering the limited resources of the Timber Section the core group defined funding activities as one of the key issues for a successful EFSOS work.

An EFSOS web page has been finalised, thanks to the Swiss Forest Agency, which sponsored this project generously. This media will open an access to EFSOS activities and outcomes for all interested people. Another meeting in 2000 of GFPM (Global Forest Products Model) specialists discussed the possible use of this model in the framework of EFSOS. Global forest sector outlook specialists from FAO in Rome are intensively supporting activities in this field.

For the outlook study on European forest resources, the accumulated knowledge of EFISCEN (European Forest Information Scenario) will be used. This project will focus on linkages with future developments on timber markets. TBFRA (Temperate and Boreal Forest Resource Assessment) data will be adapted to the EFISCEN data set. A first draft on methodology should be available in 2001.

Cooperation is under way with the Russian Federation about a forest sector outlook case study for Russia, which will focus on an analysis of the market oriented policies and possible impacts on the forest sector of Western Europe.

## 4. Forest products markets

### Highlights of the 1999-2000 markets

- Consumption of forest products in the ECE region once again reached record levels in 1999.
- Strong economies in Europe and North America in 1999 and early 2000 resulted in record production and trade although there were signs of slower growth ahead.
- The Commonwealth of Independent States had not recovered from the 1998 Russian economic crisis and although domestic consumption of sawnwood fell, it rose for panels and paper, however exports of most products increased.
- Prices were weak for some products and sub-regions, for example sawn softwood and panels in North America where, new capacity outstripped the rise in consumption.
- Central and eastern European countries exported more roundwood and primary-processed products as well as increased exports of value-added products such as furniture.
- Life-cycle analysis for wood-based panels confirmed continued growth for OSB and MDF and stagnation for particleboard and plywood in North America.
- The ECE region has the majority of the world's certified forestland and new certification systems for sustainable forest management are being implemented with possibilities for mutual recognition between systems. With the new certificates, the demand for certified products is less than the potential supply.
- Windstorms in December 1999 felled 3 years' worth of timber in Europe causing chaos in forests and forest products markets for roundwood in early 2000.
- China is rapidly increasing forest products imports with important benefits for ECE region exporters.
- Japan began recovery from the 1997/1998 Asian economic crisis and imports from the ECE region improved.

The above highlights of the findings of the *Forest Products Annual Market Review, 1999-2000* are elaborated in the publication (also available on the Committee's website).

### Highlights of the 2000-2001 markets

At the annual Timber Committee market discussions, held jointly with the FAO European Forestry Commission in Rome in October 2000, an important point in the annual market statement was that forest products markets are an essential part of sustainable management of the forest sector as a whole. Other highlights and forecasts were:

- The European log markets in 2000 show the effects of the December 1999 windstorms, which resulted in catastrophic windthrow of 190 million m3 of timber, equivalent to 3 years' harvest in the worst hit countries, such as France.
- Demand for most forest products in 2000 was strong in both Europe and North America, and markets were recovering from low levels in the CIS.
- Sawn softwood consumption, production and trade were forecast to rise sharply, by 4-5%, in Europe in 2000, to record levels.
- North American sawn softwood consumption, currently at record levels, was forecast to slow slightly in 2000 and 2001.

- Russian forecasts signal the end of a steep downward trend in sawn softwood consumption, production and trade.
- Due to the December 1999 storms, European log markets had a sharp increase in production and exports, in some cases, prices of roundwood fell sharply in affected regions, despite measures taken to minimise market disruption.
- Demand for sawn hardwood was forecast by the Joint Session to advance to new record levels in the ECE region in 2000 and 2001.
- The increases expected in the United States exports of sawn hardwood will boost current record levels to Europe and some Asian countries.
- Consumption of wood-based panels (particle board, fibreboard and plywood) in Europe and North America is expected to expand to new record levels.
- The recovery of economic activity in the Russian Federation is reflected in the wood-based panels sector, with consumption forecast to rise by 15% in 2000.
- European production of oriented strand board (OSB) continues to grow as new markets develop. In North America, OSB is 52% of the structural board market, and greater production increases are driving prices downward.
- European MDF production is rising rapidly too, to record levels.
- The manufacture and use of engineered wood products (EWPs) are expanding globally and EWPs are substituting for some traditional sawnwood and some non-wood applications.
- The forest area certified for sustainable forest management is expanding and there is an increasing acceptance of the process of certification, with over 90% of the world's certified forests being in the ECE region.
- In Europe the first products certified under the Pan-European Forest Certification scheme are expected on the market in 2000. However, the market for these products remains limited, with demand coming from retailers, and not consumers.
- The trade in secondary processed wood products (furniture, joinery, mouldings and other further-processed products) is growing faster than primary products, both in temperate and tropical species. The ECE region is the world's major producer, importer and exporter of secondary wood products.

Complete text of the Committee and Commission's market statement may be found on the website and in the *Timber Bulletin* issue titled "Forest Products Markets in 2000 and Prospects for 2001."

## 5. Forest Technology, Management and Training

The Joint Committee held its twenty-third session in Geneva from 5-8 June 2000. It reviewed its cooperation with other international organizations and highlighted its contribution to the Ministerial Conference on the Protection of Forests in Europe (MCPFE) in favour of sustainable forest management. It also reviewed its public relations, notably the establishment of its website: <www.unece.org/trade/timber/joint-committee>.

The following special topics were presented: Codes of practice as a tool for sustainable forest management - the case of Ireland; Forest operations in Europe - a critical appraisal from an NGO perspective; Markets for certified forest products; Forest technology, management and training in dealing with major windblow in France.

The Joint Committee reviewed recent achievements and developments in its field of interest. It agreed to start work on the following new activities: disaster preparedness in forestry, for which a team of

specialists is to be established; new roles and modes of operation of forest services; close to nature forestry; mobilisation of additional wood supply mainly from private forests; biodiversity - from concept to practice; and on traditional forest related knowledge. The government of Switzerland organized two study visits during the session: a wood heating plant with a heat-power converter in Biere (VD), backed by a federal programme to encourage the use of wood as a renewable source of energy and a visit to the region of Châtel-St-Denis (FR) where clear-up work after the forest damage caused by Lothar and restoration measures taken were presented.

## 6. Forestry information systems 2000

The workshop on Forestry Information Systems 2000 was held in Hyytiälä, at the invitation of the Government of Finland from 16 to 20 May 2000. The workshop successfully demonstrated that computer and remote sensing technologies combined with advances in databases and GIS technology have finally been developed to a stage that provides **usable operational tools for foresters**. Similar advances in the practical application of research in these fields can be expected in the near future. In particular GIS are now becoming integrated into main information and management systems and not simply used as a mapping tool. The whole information production chain is facing numerous **new challenges**. The amount of the information required in forestry related decision making is constantly increasing and new issues are surfacing. Consequently additional data needs are arising.

**Forest management and environmental management planning** are inextricably linked together. At a high political level there is a clear and understandable definition for sustainable forest management (SFM) - and much effort has been given to defining the criteria and indicators for SFM. However, there seems to be an increasing need for identifying and collecting credible data for describing the SFM status at the operational level. The role of the information systems is to **integrate** different data collection, transferring, processing, storing, retrieving, updating, modelling and dissemination functions. Cost efficiency is integral to all of these. Differing scales and the '**whole of ecosystem' approach** set very high demands on data integration and thus, information systems.

**New technologies** including the World Wide Web and wireless communications, visualisation and data mining are increasing in importance in both decentralisation of the information systems and in the dissemination of all information.

## 7. Harvesting of non-wood forest products

The seminar on Harvesting of non-wood forest products (NWFP) was held in October 2000 in Menemen-Izmir (Turkey) at the invitation of the Ministry of Forestry and under the auspices of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training.

A wide range of topics covering inventory, harvesting, processing, utilisation and trade of non-wood forest products were presented, showing that many species of NWFP are being harvested unsustainably and furthermore, in many cases, management practices are insufficiently known or implemented. The importance of managing NWFP in the context of sustainable forest management and its contribution to rural development and agriculture was underlined, specifically for women and economic disadvantaged groups of the society living in the vicinity of the forest resources for food, income, employment and medicinal plants, and other. The sustainable utilisation of NWFP requires the involvement of experts in a wide range of disciplines, including indigenous knowledge.

A great need was felt by the participants for more information and training, on the management and valorisation of NWFP. In this way, participants suggested the need for follow-up seminars and/or workshops focussed on specific technical topics. There is a tremendous wealth of knowledge held by

those living in and near forests. This knowledge is also in danger of being lost and is not well taken into account in efforts to manage forests.

### 8. Assistance to countries in transition of central and eastern Europe

The UNECE Timber Committee provides assistance and develops cooperation with countries of central and eastern Europe in transition (CITs) in order to promote the process of economic reform in their forest and the transformation of the forest products sector. The team of specialists (ToS) guides this work and ensures at its regular sessions that the themes and topics of the cooperation and assistance are in line with the priorities and needs identified by the countries concerned. The Timber Committee and the European Forestry Commission, at their joint session (October 2000) were informed of the current strategic directions of this work. They noted and commended the close cooperation on CITs between ECE/FAO and the Ministerial Conference on the Protection of Forests in Europe, especially in monitoring the implementation of Resolution H3.

The Timber Committee secretariat has continued the implementation of its mandate as the international co-ordinator for Helsinki resolution H3 on forestry assistance to countries in transition. It collects, stores and analyses information and reports regularly to the parent bodies and, as appropriate, to meetings of the pan-European Process on the Protection of Forests. The electronic database, which includes the information on the topic supplied by national correspondents on project-by-project basis, has been further developed and up-dated in 2000. The series of the marketing workshops for CITs, and the international workshop on "Changing Role of State Forests" were an important contribution of the Timber Committee's work in this area.

### 9. Marketing and sustainable development of non-wood forest products in countries in transition of central and eastern Europe

The workshop was hosted by the State Forest Service, Republic of Moldova and held under the auspices of the Timber Committee of the United Nations Economic Commission for Europe from 23-27 October 2000 in Chisinau, Republic of Moldova. The purpose of the workshop was to sensitise participants on marketing of forest products, specifically non-wood forest products. The workshop provided an invaluable opportunity for participants to exchange information and to receive an introduction to marketing. In addition it provided an opportunity to make contacts for current and future collaboration.

The workshop concluded:

- While countries are in different phases of transition, all had common problems.
- The transition process has negatively affected NWFP markets and marketing.
- There is a great potential for better development of the NWFP sector in CITs, developing it as an important sector of the country's economy.
- The development of marketing as a comprehensive group of activities is a main concern for the future development of the NWFP sector in CITs.
- The current workshop addressed, and similar workshops in the future should further address, the recommendation of the FAO/ECE/ILO Joint Committee on Forest Technology, Management and Training's seminar in Ismir, Turkey, held earlier in October 2000, which called for such workshops on the marketing of NWFPs.

## 10. Study tour in Canada

The joint Timber Committee and European Forestry Commission Study Tour in Canada followed the theme of certification of sustainable forest management and forest products in the provinces of Quebec and British Columbia. The tour was well organised overall by Industry Canada and within the provinces by the Quebec Ministry of Natural Resources and the British Columbia Ministry of Forests. The tour included 2 seminars on the provinces' forest sectors and current certification developments. Certification of forestland is increasing rapidly in Canada and certified forest products are available for the domestic and export markets.

Twenty-six participants plus hosts visited forests within the provinces, both hardwood and softwood, and heard foresters speak about forest management and its changes over the past few years to be more participatory in nature. Certification is shaping some forest management too. The tour included a number of forest industries, including OSB manufacturing, a west coast sawmill, log home manufacturing and a log sorting operation. Participants benefited from seeing the differences in forests and forest industries in the two provinces.

Participants warmly thanked all of their hosts, both from the public and the private sector, for the wonderful hospitality and the insight into a fast changing forest and forest industry sector. Based on results of the participant questionnaire, they were satisfied with the tour and encouraged the secretariat to facilitate future tours, with a current issue as a theme as relevant to the host country.

On behalf of the UNECE Timber Committee and the FAO European Forestry Commission, the tour participants and the office holders, the secretariat wishes to again express their deep appreciation to Industry Canada and the Quebec Ministry of Natural Resources and the British Columbia Ministry of Forests for an excellent tour.

## 11. Public relations in forestry

The FAO/ECE Team of Public Relations Specialists in the Forest and Forest Industries Sector conducted a major event, the International Forest Communicators Forum 2000 in St. John's, Newfoundland, Canada in September. The Forum 2000 provided an opportunity to explore cooperative approaches to public relations in the sector that transcend specific products or national borders. The forum identified global challenges faced by wood and paper products and allowed participants to share information and success stories, so as to foster the development of approaches and strategies to meet these challenges. Part of the Forum 2000 was based on the Team's publication of "The competitive climate for wood products and paper packaging: the factors causing substitution with emphasis on environmental promotions@ and its expanded executive summary in a *Geneva Timber and Forest Discussion Paper* (available from the secretariat and from the Timber Committee website).

Following the Forum 2000 the Team met in St. John's and discussed the following issues: 1. The follow-up from the Forum, including establishing a Consumer Behaviour Subgroup, an Extranet Subgroup, and producing a compendium of best PR practices; 2. Ministerial Conference on the Protection of Forests in Europe follow-up; 3. United Nations Forum on Forests; and 4. Building PR capacity in central and eastern European countries; 5. European Forums for Forest and Society; and 6. Forestry in Schools Programme. (Meeting report available on the PR Team website within the Timber Committee website.)

The Team will participate in two seminars in 2001 organised under the auspices of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training. The first will be "Women in Forestry" in April in Portugal. The second will be "Forestry Meets the Public," on 8-11 October 2001 in Switzerland.

At the Joint Timber Committee and European Forestry Commission session in October 2000 the mandate of the Team was renewed until 2004 with a new short name of the "FAO-ECE Forest Communicators Network".

The international network of PR specialists grew considerably with the International Forest Communicators Forum and now includes 35 countries within the ECE region, which have participated in the Team's activities. Its next meeting will be on 21-23 May 2001 in Slovakia, a site deemed beneficial for its mandated work on capacity building of public relations capabilities in the forest and forest industries sector in central and eastern European countries.

More information on the Team and its activities may now be found on its website within the Timber Committee site. Presently the site includes subdivisions of its mandate, meetings, members, publications and coming activities.

## II. ACTIVITIES PLANNED FOR 2001 AND 2002

This section is intended to provide readers with information on the Committee's forthcoming activities. It is not a definitive programme, as additions or deletions sometimes have to be made at fairly short notice. Meetings are formally announced by the circulation of a provisional agenda at least three months before their scheduled date, and a press release is also issued.

Attendance at seminars, symposia and study tours organized by the Committee is open to experts in the subjects to be discussed, with permission of their Governments. Further information about all this activities is available on request from the secretariat.

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### The Timber Committee's annual session

The Timber Committee meets annually generally in Geneva. Its session in 2001 will be held from 2-5 October. The main items on the agenda are: international dialogue on forests, support to the global and regional processes; review of recent developments and prospects in the coming year in the forest products markets; review of activities of its subsidiary bodies and of meetings held over the previous year under joint auspices, international cooperation.

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### European Forest Sector Outlook Studies (EFSOS)

A core group meeting and a meeting of official nominated national correspondents will be held in 2001. The core group meeting will give information about EFSOS activities in 2000, reviewing the EFSOS programme and planning the main activities for 2001/2002, focussing on a base line study (outlook for forest resources and timber markets), enlargement of resources, public relation activities for EFSOS, definition of relevant future development scenarios of the European forest sector, and case studies. The national correspondents meeting will focus on briefing the correspondents on their tasks and a more general review of EFSOS activities and the work programme.

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### Study tour on forest and forest industries of Poland

On behalf of the Ministry of Environment, the State Forests National Forest Holding is pleased to host the UNECE Timber Committee and FAO European Forest Commission study tour of the forest and forest industries of Poland from 17 to 22 September 2001.

The tour will begin on 17 September in the Training Centre of the Ministry of Environment in Debe, near Warsaw and will terminate on 22 September in Warsaw. Please note that in the same Centre in Debe the international workshop on "Forest and Forestry in Central and Eastern Countries - the transition process and challenges ahead" will be held in 12-15 September 2001.

The tour will provide an opportunity to see forests and forest practices in operation, as well as a number of wood industrial plants and their products. The forest ecosystems are the most valuable for all forms of nature conservation in the climatic and geographical zone in which Poland is located. The area of forest in Poland is 8,850,000 ha which is equivalent to 28.3% of the country's area. The "National Programme for the Augmentation of Forest Cover" adopted by the Government of the Republic of Poland in 1995 anticipates an increase of forest cover to 30% by 2020 and 33% by 2050.

Public ownership predominates, accounting for 82.8% of the total area. This figure includes the forest under the management of the State Forests Holding, 78.4%, plus national parks, 2% of the total. Private forests account for 17.2% of Poland's forests.

The Polish forest industry is relatively self-sufficient. Timber resources are estimated at 1.6 billion m3 of large timber of which 86% are under the management of the State Forests Holding. Coniferous species dominate in Poland with pine and larch accounting for 69% of coniferous species. The more fertile leaved broad forest habitats account for 39.4% and the alder and riparian woodland habitats for 3.9%. However, it should be noted that the percentage of leaved broad stands has been gradually increasing.

Changes in forest sector legislation are wide spread to address a broad range of problems. Amendments were adapted to the forest law "National Policy on Forests" in 1997. Since 1994 a new concept of Promotional Forest Complexes and ecological principles of forest management are being implemented. The dynamic development of the private sector is evident in the more than 90% of the production of the whole wood industry sector from private companies. On the whole, 70% of Polish industry sector has been privatised.

More detailed information on "Poland's Forest Products Markets" and its entire forest sector may be found in a special chapter in the Timber Bulletin "*Forest Products Annual Market Review, 1999-2000*" at www.unece.org/trade/timber/docs/rev-00/04.pdf

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**Statistics**

The Committee will continue to publish its regular statistics in the *Timber Bulletin*, on forest products production and trade, trade flows of forest products, the monthly prices for forest products, and the results of the annual enquiry on forest fire.

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**Forest products markets**

Other issues of the *Timber Bulletin* will contain the Committee's regular review and analyses of short-term developments in forest products markets. The annual forest products market review covers trends in the previous year and is published in July/August. The results of the Committee's discussions at its annual session, when it prepares forecasts for the current and forthcoming year, are issued in November.

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**Forest Economics and Statistics**

The FAO/ECE Working Party on Forest Economics and Statistics meets every two years. It will hold its twenty-third session in Geneva from 14-16 May 2001. It will review the European Forest Sector Outlook Studies (EFSOS), Forest Resource Assessment 2000, Market analysis and forecasts and collection and dissemination of statistics and interorganization cooperation in this field.

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**Assistance to countries in transition of central and eastern Europe**

At its annual sessions the Committee reviews its programme of assistance to countries in transition on the basis of recommendations of the team of specialists, which will meet 12-14 September in Debe, Poland to ensure that it fulfils the expectations of this group of countries. The meeting will be held in conjunction

with the workshop on forests and forestry in central and eastern European countries, the transition process and challenges ahead.

Country profiles on transition countries of central and eastern Europe will continue to be published.

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**Forest technology management and training**

The Joint FAO/ECE/ILO Committee and its Steering Committee meet in alternate years. The Steering Committee will hold its fifteenth session from 30-31 March 2001 in Lisbon, Portugal. The Joint Committee will hold its twenty-fourth session from 12-14 September 2002 in Ireland in conjunction with the seminar on afforestation. More complete information on the Joint Committee activities can be found at the website: www.unece.org/trade/timber/joint-committee. The following seminars and workshops will be organized in 2001 and 2002 under the auspices of the Joint Committee:

***Title:*** **Seminar on the role of women in the forestry sector In Europe and North America**
***Date:*** 2-6 April 2001
***Location:*** Viseu, Portugal

***Objectives:*** Rather far reaching changes have taken place with respect to the positions and roles of men and women in European and North American societies at large. The forestry sector, by contrast, appears to have largely ignored this development and mostly remained 'a man's world'. There are both ethical and factual reasons why the forestry sector should acknowledge the various roles women play in and for the sector, seek to enhance their participation and create the equality of opportunities.

***Target groups:*** In order to achieve its objectives, the seminar depends on a broad participation of men and women from a cross-section of the forestry sector in Europe and North America, but also from other parts of the world:

- Forest authorities
- Forest management
- Forest industry
- Forest owners and their associations
- Forest service officials Forestry contractors and their associations
- Trade unions and associations of professional foresters
- Training and education
- Researchers

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***Title:*** **Workshop on new trends in harvesting with cable cranes**
***Date:*** 18-24 June
***Location:*** Ossiach, Austria 2001

***Objectives:*** To discuss environmental concerns and policy demands favouring the use of cable crane and winch systems, taking into account soil protection and road construction restrictions. Development trends of cable systems and methods: smaller, highly mobile units, running skylines, hydrostatic transmissions etc. and newly developed wire/cable products. Planning procedures. Co-ordination between cable systems methods, landings and road transport, between the use of cable system and other equipment and machinery and between the use of cable systems operations and multiple/recreational use. Training and safety aspects of cable system operators.

***Target groups:*** Government agencies, forest managers

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***Title:*** **Seminar on forestry meets the public**
***Date:*** 8-11 October 2001
***Location:*** Rüttihubelbad, Switzerland

***Objectives:*** Efforts to raise awareness concerning forests and forestry have been made for many years. The seminar is organized in order to draw and build on this wealth of experience. The seminar will provide a forum for the exchange of information and opinions for all interested in public relations and environmental education in forestry. It will enable participants to compare current approaches and methods, to analyze their impact and effectiveness, to swap experience and material, and to identify new opportunities of and more effective means of public relations and environmental education in forestry.

The seminar sets out to answer the following questions:

- What do we mean by public relations and environmental education in forestry?
- Are they needed?
- Which are the target groups?
- What is the message forestry is trying to drive home?
- Who are the >messengers', which institutions are involved?
- Which means and media can most effectively convey forestry messages?
- How effective is this communication and how can impact be assessed?
- What are the deficits and how can public relations and environmental education in forestry become more effective?

***Target groups:*** The seminar is designed for all persons working with or in forests, forestry and forest industry, in media and communication as well in environmental and general education:

- PR specialists
- Journalists
- Forest service officials
- Forest industry
- Forest owners
- Environmental NGO's
- Teachers
- Environmental educators

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***Title:*** **Seminar on afforestation**
***Date:*** 15-19 September 2002
***Location:*** Ireland

***Objectives:*** The seminar will offer the opportunity to exchange and share experience on current developments in afforestation in Ireland. It will, in particular, discuss issues on sustainable forest operations and techniques and biological, ecological, social and economic aspects of afforestation.

***Target groups:*** All forest professionals, forest owners, managers, forest industries, policy decision makers, research institutes, environmentalists and land-use specialists.

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***Title:*** **Workshop on multi-functional forestry in protected and vulnerable area**
***Date:*** October 2002 (dates to be decided)
***Location:*** Sochi, Russian Federation

***Objectives:*** The workshop will review prospects and discuss an integrated system for multifunctional forestry in protected and vulnerable forest areas, taking into account ecological aspects. Furthermore, the seminar will deal with the following issues:

- Social conditions for the development of the forestry sector in context of ecological constraints;
- Multifunctional forestry as a key factor in the stable and balanced development of the forestry sector of tomorrow;
- Improvement of the system of management of forest resources using new information technologies, monitoring and automated systems;
- Scientifically based standards for the use of forest resources;
- Computer-based simulation techniques for forecasting the impacts of multifunctional forest utilization on the environment;
- Recreational use of protected and vulnerable forest areas;
- Optimising multifunctional forest utilization in mountain forests system for forecasting its impacts on forest ecology;
- Genetic resources and bio-logical diversity in forest ecosystems

***Target groups:*** Forest managers, administrations and associations, research institutes and training centres.

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## III. BIBLIOGRAPHICAL REFERENCES

The Timber Committee publications (other than reports and associated documents) have been organized since 1994, into the following five series:

| | |
|---|---|
| Timber Bulletin | ECE/TIM/BULL/xx/x |
| Timber and Forest Study Papers | ECE/TIM/SP/x |
| Timber and Forest Discussion Papers | ECE/TIM/DP/x |
| Timber and Forest Information Series | ECE/TIM/INF/x |
| Timber and Forest Seminar and Workshop Proceedings | no symbol |

The Committee publishes the ***Timber Bulletin***, which provides regularly, detailed information on the forest products sector: statistics on production, removals, trade (total and by origin and destination), prices; the results of an annual survey on forest fires; analyses of market developments and prospects for the coming year. The contents of the ***Timber Bulletin*** in 2000 are set out in the bibliography.

The ***Timber and Forest Study Papers*** are composed of the European Timber Trends and Prospects Study (ETTS V), Forest and Forest Products Country Profiles, Forest Resource Assessment publications, medium-term surveys of the structure and capacity of the wood-based panels and sawmilling industries, and other special studies. The ***Timber and Forest Discussion Papers*** are intended to be a means of distributing current topical information in the forest and forest industries sector which might or might not become part of a more comprehensive study at some later time. Unlike the ***Timber Bulletin*** and the ***Study Papers***, the ***Discussion Papers*** have limited input from the secretariat and are published in their original language. ***Timber and Forest Seminar and Workshop Proceedings*** are not published by the secretariat, but by the host country of such activities, this explains why there is no identification code. Finally, the ***Timber and Forest Information Series*** which consists of this ***Timber Committee Yearbook***, plus ***Facts about*** ... the Committee and its two subsidiary bodies, which presents background information and activities of each of these bodies. A comprehensive list of publications appears at the back of this ***Yearbook***.

Issues of the ***Timber Bulletin*** are available on subscription (see below). Unless otherwise indicated, other documents are available on request, free of charge from the secretariat, while stocks last. Set out below are bibliographical references to those documents issued under the Committee's auspices in 2000, the **documents are described under the same headings as the text of the *Yearbook***. Further information may be obtained from the Timber Section secretariat (see address on page iv).

### 1. FOREST RESOURCE ASSESSMENT 2000 - TEMPERATE AND BOREAL ZONES

Forest Resources of Europe, CIS, North America, Australia, Japan and New Zealand (ECE/TIM/SP/17)

### 2. PROMOTION OF SUSTAINABLE FOREST MANAGEMENT IN THE REGION

Report to fifty-eighth session of the Timber Committee (TIM/2000/3; FO: EFC/00/4)
Report of fifty- eighth session of the Timber Committee (ECE/TIM/95)

### 3. EUROPEAN FOREST SECTOR OUTLOOK STUDIES

Report to fifty-eighth session of the Timber Committee (TIM/2000/7/Add.1; FO:EFC/00/9/Add.1)

### 4. FOREST PRODUCTS MARKETS

***Timber Bulletin*** Forest Products Annual Market Review, 1999-2000 (ECE/TIM/BULL/53/3)

The ***Timber Bulletin*** consists of 6 issues a year and is available on an annual subscription. For further information, those interested are invited to contact the United Nations Distribution and Sales Unit, Palais des Nations, 1211 Geneva 10, Switzerland (Fax NE: +41 22 917 00 27).

The contents of the ***Timber Bulletin*** in 2000, Vol. LIII, was as follows:

| Title: | Issue: |
|---|---|
| Forest Products Prices, 1997-1999 | ECE/TIM/BULL/53/1 |
| Forest Products Statistics, 1995-1999 | ECE/TIM/BULL/53/2 |
| Forest Products Annual Market Review, 1999-2000 | ECE/TIM/BULL/53/3 |
| Forest Fire Statistics, 1997-1999 | ECE/TIM/BULL/53/4 |
| Forest Products Trade Flow Data, 1998-1999 | ECE/TIM/BULL/53/5 |
| Forest Products Markets in 2000 and Prospects for 2001 | ECE/TIM/BULL/53/6 |

**RELEVANT FAO STATISTICAL PUBLICATIONS**

(Available from: Distribution and Sales Section, Food and Agriculture Organization of the United Nations, Via delle Terme di Caracalla, I-00100 Rome)

FAO Yearbook of Forest Products 1999
State of the World's Forests 2000

## 5. FOREST TECHNOLOGY, MANAGEMENT AND TRAINING

Report of the twenty-second session of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, Geneva (TIM/EFC/WP.1/2000/2)

## 6. FORESTRY INFORMATION SYSTEMS 2000

Report of the seminar (TIM/EFC/WP.1/AC.1/2000/1)

## 7. HARVESTING OF NON-WOOD FOREST PRODUCTS

Report of the seminar (TIM/EFC/WP.1/SEM.49/2)

## 8. ASSISTANCE TO COUNTRIES IN TRANSITION OF CENTRAL AND EASTERN EUROPE

Report to the Timber Committee: Programme of Work: (TIM/2000/7; FO:EFC/00/9)

**Report on the implementation of resolution H3**

The H3 database in ACCESS format is periodically updated and posted at the Timber Committee Website

**Forest and forest products country profiles**

## 9. MARKETING AND SUSTAINABLE DEVELOPMENT OF NON-WOOD FOREST PRODUCTS IN COUNTRIES IN TRANSITION OF CENTRAL AND EASTERN EUROPE

Report to the fifty-ninth session of the Timber Committee (TIM/2001/7)

**10. STUDY TOUR IN CANADA**

Report of fifty- eighth session of the Timber Committee (ECE/TIM/95)

**11. PUBLIC RELATIONS IN FORESTRY**

Report of fifty- eighth session of the Timber Committee (ECE/TIM/95)

## IV. LIST OF MEETINGS IN 2001 AND 2002

Note: The meetings are sub-divided into two categories: meetings marked (A) are open to delegates or approved representatives from all member countries of ECE was well as from other countries that are members of the United Nations and organizations accredited to ECE (or to FAO and ILO, in the case of meetings co-sponsored by them). Meetings marked (B) are those restricted to the countries or individuals nominated by their countries to take part in the activity concerned, e.g. a team of specialists. At the Committee's website (http://unece.org/trade/timber) an up-to-date calendar of meetings, can be consulted

| Dates | Location | Title |
|---|---|---|
| **2001** | | |
| 30-31 March | Lisbon, Portugal | Steering Committee of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, 15th session (B) |
| 2-6 April | Viseu, Portugal | Seminar on the role of women in the forestry sector in Europe and North America (A) |
| 14-16 May | Geneva | Joint FAO/ECE Working Party on Forest Economics and Statistics, twenty-third session (A) |
| 18-24 June | Ossiach,Austria | Workshop on new trends in wood harvesting with cable cranes (A) |
| 12-14 September | Debe, Poland | Workshop on forests and forestry in central and eastern European countries, the transition process and challenges ahead; and meeting of the team of specialists to monitor and develop assistance to countries of central and eastern Europe in transition (A) |
| 17-23 September | Poland | Joint Timber Committee European Forestry Commission study tour on Poland's forestry and wood industry sector in the transition process and future plans (A) |
| September (To be decided) | Romania | Seminar on strategies to stimulate and promote the sound use of wood and other forest based products as environmentally friendly and renewable materials (A) |
| 2-5 October | Geneva | ECE TIMBER COMMITTEE, fifty-ninth session (A) |
| 8-11 October | Rüttihubelbad, Switzerland | Seminar on forestry meets the public (A) |
| (To be decided) | Finland | European Forum on Forest and Society (B) |
| **2002** | | |
| 1-2 May | Geneva | Meeting of the Timber Committee office holders and the EFC Executive Committee (B) |
| 12-14 September | Ireland | Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, 15th session (A) |
| 15-19 September | Ireland | Seminar on afforestation (A) |
| 24-27 September | Geneva | ECE TIMBER COMMITTEE, sixtieth session (A) |
| October (To be decided) | Sochi, Russian Federation | Workshop on multi-functional forestry in protected and vulnerable areas (A) |
| Autumn | Rome | Meeting of the team of specialists on temperate and boreal forest resource assessment 2000 (B) |
| (To be decided) | Flanders, Belgium | Seminar on partnerships in forestry (A) |

## SOME FACTS ABOUT THE TIMBER COMMITTEE

The Timber Committee is a principal subsidiary body of the ECE (UN Economic Commission for Europe), based in Geneva. It constitutes a forum for cooperation and consultation between member countries on forestry, forest industry and forest product matters. All countries of Europe; the former USSR; United States of America, Canada and Israel are members of the ECE and participate in its work.

The ECE Timber Committee shall, within the context of sustainable development, provide member countries with the information and services needed for policy- and decision-making regarding their forest and forest industry sector ("the sector"), including the trade and use of forest products and, when appropriate, formulate recommendations addressed to member Governments and interested organizations. To this end, it shall:

1. With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those offering possibilities for the facilitation of international trade and for enhancing the protection of the environment;

2. In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability;

3. Provide the framework for cooperation e.g. by organizing seminars, workshops and *ad hoc* meetings and setting up time-limited *ad hoc* groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries that is needed for the development and implementation of policies leading to the sustainable development of the sector and to the protection of the environment in their respective countries;

4. Carry out tasks identified by the UNECE or the Timber Committee as being of priority, including the facilitation of subregional cooperation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic point of view;

5. It should also keep under review its structure and priorities and cooperate with other international and intergovernmental organizations active in the sector, and in particular with the FAO (Food and Agriculture Organization of the United Nations) and its European Forestry Commission and with the ILO (International Labour Organisation), in order to ensure complementarity and to avoid duplication, thereby optimizing the use of resources.

More information about the Committee's work may be obtained by writing to:

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UNECE Trade Division
Palais des Nations
CH - 1211 Geneva 10, Switzerland
Fax: + 41 22 917 0041
E-mail: info.timber@unece.org
Web site address: http://www.unece.org/trade/timber

## UNECE/FAO Publications

**Timber Bulletin** Volume LIII (2000) ECE/TIM/BULL/53/...
**Timber Bulletin** Volume LIV (2001) ECE/TIM/BULL/54/...

1. Forest Products Prices
2. Forest Products Statistics (database [chronological series, since 1964] also available on diskettes)
3. Forest Products Annual Market Review
4. Forest Fire Statistics
5. Forest Products Trade Flow Data
6. Forest Products Markets in *(current year)* and Prospects for *(forthcoming year)*

**Geneva Timber and Forest Study Papers**

| | |
|---|---|
| Forest policies and institutions in Europe, 1998-2000 | ECE/TIM/SP/19 |
| Forest and Forest Products Country Profile: Russian Federation | ECE/TIM/SP/18 |
| Forest Resources of Europe, CIS, North America, Australia, Japan and New Zealand | ECE/TIM/SP/17 |
| State of European forests and forestry, 1999 | ECE/TIM/SP/16 |
| Non-wood goods and services of the forest | ECE/TIM/SP/15 |
| European Timber Trends and Prospects: into the 21st century (ETTS V) | ECE/TIM/SP/11 |

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**Geneva Timber and Forest Discussion Papers** *(original language only)*

| | |
|---|---|
| Markets for Secondary Processed Wood Products, 1990-2000 | ECE/TIM/DP/21 |
| Forest Certification update for the ECE Region, summer 2000 | ECE/TIM/DP/20 |
| Trade and environment issues in the forest and forest products sector | ECE/TIM/DP/19 |
| Multiple use forestry | ECE/TIM/DP/18 |
| Forest Certification update for the ECE Region, summer 1999 | ECE/TIM/DP/17 |
| A summary of "The competitive climate for wood products and paper packing: the factors causing substitution with emphasis on environmental promotions" | ECE/TIM/DP/16 |
| Recycling, Energy and Market Interactions | ECE/TIM/DP/15 |
| The Status of forest certification in the ECE region | ECE/TIM/DP/14 |
| The role of women on forest properties in Haute-Savoie: Initial researches | ECE/TIM/DP/13 |
| Interim Report on the Implementation of Resolution H3 of the Helsinki Ministerial Conference on the protection of forests in Europe (Results of the second enquiry) | ECE/TIM/DP/12 |
| Manual on acute forest damage | ECE/TIM/DP/7 |

**International Forest Fire News** *(two issues per year)*

**Timber and Forest Information Series**
Timber Committee Yearbook 2001 ECE/TIM/INF/8

***The above series of publications may be requested free of charge through:***

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